Inspired Philanthropy:
Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy
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Exercise 2.3

Vision and Values

15–20 minutes

Put a check mark beside the values below that resonate for you. Then circle the *three* that are most important to you.

☐ Community	☐ Harmony	☐ Preservation
☐ Compassion	☐ Healing	☐ Respect
☐ Courage	☐ Honesty	☐ Self-Discipline
☐ Creativity	☐ Humility	☐ Self-Respect
☐ Determination	☐ Independence	☐ Service
☐ Diversity	☐ Innovation	☐ Simplicity
☐ Empathy	☐ Integrity	☐ Spirituality
☐ Equality	☐ Interdependence	☐ Stability
☐ Excellence	☐ Justice	☐ Teamwork
☐ Fairness	☐ Knowledge	☐ Thrift
☐ Faith	☐ Leadership	☐ Tradition
☐ Family	☐ Love of comfort	☐ Transformation
☐ Freedom	☐ Love of others	☐ Other: _____
☐ Generosity	☐ Loyalty	☐ Other: _____
☐ Good sense	☐ Patience	☐ Other: _____
☐ Hard work	☐ Peace	☐ Other: _____

Issue Areas and Concerns

Following are words or phrases that describe issue areas and concerns that you may care about as a contributor. The areas listed are only for inspiration. You may never have donated time or money to these areas of interest before; this exercise is simply to give you the chance to recognize what has meaning for you among things you could give to. Put check marks next to those that have the most meaning for you. Then go through the list again and circle your top three.

☐ Aging	☐ Catholic charities	☐ Death and dying
☐ Animals and species Preservation	☐ Children or child care	☐ Demilitarization
	☐ Civil rights	☐ Disability rights
☐ Anti-Semitism	☐ Coexistence	☐ Disaster relief
☐ Anti-Racism	☐ Community gardens	☐ Domestic violence
☐ Arts and art institutions	☐ Computer literacy	☐ Drug and alcohol abuse
☐ Biodiversity	☐ Corporate responsibility	
☐ Boys		☐ Economic justice
☐ Business development	☐ Cultural heritage	☐ Education

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Exercise 2.3

Vision and Values, Cont'd

- ☐ Elder care
- ☐ Electoral reform
- ☐ Employment training and job creation
- ☐ Environment or environmental justice
- ☐ Faith-Based community service
- ☐ Gay, lesbian, bisexual, or transgendered rights
- ☐ Girls
- ☐ Global climate change
- ☐ Gun control
- ☐ Health care and prevention
- ☐ HIV and AIDS
- ☐ Homelessness and housing
- ☐ Homophobia
- ☐ Human rights

- ☐ Immigrant and refugee rights and services
- ☐ International development
- ☐ Islamic causes
- ☐ Jewish causes
- ☐ Legal aid and services
- ☐ Libraries
- ☐ Literacy
- ☐ Media
- ☐ Medical research
- ☐ Native and indigenous peoples' rights
- ☐ Nutrition and hygiene
- ☐ Parks and land preservation
- ☐ Peace or conflict resolution
- ☐ Philanthropy and volunteerism

- ☐ Poverty solutions
- ☐ Prison reform
- ☐ Public policy or advocacy
- ☐ Religion
- ☐ Reproductive rights
- ☐ Science and technology
- ☐ Seniors
- ☐ Spiritual development
- ☐ Sports and recreation
- ☐ Sustainability and sustainable development
- ☐ Women's leadership and civil liberties
- ☐ Youth development
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Reflection: Do you see a relationship between your top values and your top interest areas? Here are two examples:

1. My top three values are dignity, equality, and opportunity, and my top three issue areas are education, economic justice, and youth development. I believe that the opportunity for a good education, particularly for young people who are shut out of their full potential early on because of poor schools, is vital to dignity, equality, and, finally, economic justice for everyone.

2. My top three values are community, justice, and respect, and my top three issue areas are seniors, poverty, and homelessness and housing. The relationship I see is that in order for everyone to live in a just community, all seniors must have enough financial support, including good housing, to lead their lives with respect.

Write down the relationships you see among your own values and interests: